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JUL 27

Broadcasting

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- RETRANSMISSION CONSENT ODD MAN OUT IN HOUSE CABLE BILL / 3
- DESPITE *DENNIS MILLER*, TRIBUNE STILL LIKES LATE NIGHT / 19
- RULE CHANGES ENERGIZE RADIO STATION SALES / 28

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TV'S MID-YEAR MIXED RESULTS

Lower costs boost revenue for many group owners

By Geoffrey Foisie

TV station owners last week reported a mix of second-quarter revenue gains and declines. Even those reporting higher revenue did not see performance returning to the level of the 1990 second-quarter levels.

Capital Cities/ABC said broadcasting operating income was up 3% in the second quarter, to $236.6 million, thanks primarily to its Video Enterprises division as well as the absence this year of a one-time charge, incurred in the second quarter of 1991, to the ABC-TV network related to staff reductions. Earnings for both the radio and TV station divisions declined. Broadcasting revenue was up 2%, to $1.1 billion, primarily due to ESPN's continued growth and the second-quarter timing of the Academy Awards telecast.

General Electric said NBC's operating profit "increased sharply on flat revenue," reflecting, it said, stabilized network revenue, improved cost controls and an improving advertising market.

McGraw-Hill posted a 5% gain in operating profit on a 4% rise in revenue. Much of the improvement, the company said, came from improved performance by its KMGH-TV Denver.

Gannett's TV division reported a 2% revenue gain as did Viacom's TV group, the latter to $22.6 million. Operating income at Viacom's TV stations slipped 2%, to $9.4 million. Pulitzer's broadcasting revenue edged up just under 1%, to $29.2 million, while cash flow grew 4% to $9.6 million. Pulitzer cited lower programing costs.

Post Newsweek's TV stations reported a 2% revenue decline.

Among independent TV station groups, Paramount said higher revenue and lower costs helped boost operating income for its stations. Tribune said that, excluding recently acquired WPHL-TV Philadelphia, revenue for its TV group increased 3% over a year ago. Operating profit also increased. ■

This Week

HOUSE PASSES CABLE REREG / 3

By a 340-73 vote, the House of Representatives passed its version of a cable reregulation bill last Thursday night.

TRIBUNE'S NEXT TRY / 19

The failure of its *Dennis Miller Show* to light a fire in late night hasn't cooled Tribune Entertainment's desire for a presence in the daypart. The company would like to entice David Letterman over to syndication.

REUTERS TAKES VISNEWS / 23

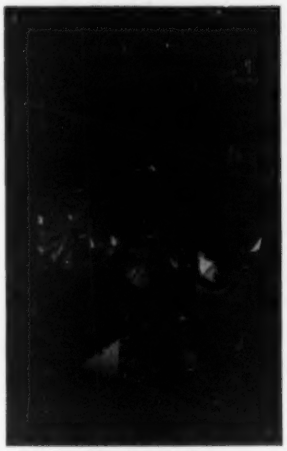
NBC and the BBC have sold their stakes in Visnews, the international television news service, to majority partner Reuters, signaling an effort by the news agency to become a major player in the TV news business.

TELCOS: NOT ENOUGH / 24

Telcos say the FCC's video dialtone ruling offers little incentive for moving into programing.

CABLE'S COUNTRY TUNE / 26

The appeal of Branson, Mo., as a country music mecca may translate into TV success if a pair of investors are successful in their plans to launch a cable network and produce pilots for syndication.



Scientific-Atlanta's new receiver-demodulator and multichannel decoder, elements of the digital revolution (p. 37)

RADIO'S TRADING JUMP / 28

The upcoming expansion in the number of radio stations a broadcaster can own in the same market is spawning an expansion in station trading.

RBDS, WITH AM / 30

Broadcasters and electronics manufacturers are moving closer to a radio broadcast data system standard that will include AM.

OPPOSITION TO PTAR WAIVER / 31

Chico, Calif., NBC affiliate KCPM(TV) asked the FCC not to renew KCRA-TV's prime time access rule waiver, arguing that the Sacramento station's prime time shift has had an adverse effect on KCPM's ratings and ad revenue.

NIELSEN GAINS IN RATING WAR / 34

While Arbitron diverts its attention to its ScanAmerica metering service, Nielsen has bolstered its market share by attracting station groups.

SPECIAL REPORT: SATELLITES '92 / 37

The fuse is lit for a channel boom: As a $1 billion satellite investment flies into orbit, programers are buying digital compression equipment to multiply their video capacity.

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Broadcasting's Ratings Week ⚡ Jul 13-19

	ABC	CBS	NBC	FOX
MONDAY	6.3/11	7.2/13	6.8/13	7.2/13
8:00	43. FBI: Untold Str 7.4/14	38. Evening Shade 7.9/15	19. Fresh Prince 9.7/19	47. Fox Night at the Movies—Revenge of the Nerds 3 7.2/13
8:30	51. Sts of Bev Hills 6.8/12	35. Major Dad 8.1/15	27. Blossom 8.7/16	
9:00	31. FBI: Untold Str 8.3/15	13. Murphy Brown 10.3/18	78. Pacific Station 5.5/10	
9:30	79. '92 Vote—Democratic National Covention 5.3/10	71. Campaign '92—Democratic Convention 5.7/10	46. Man of the People 7.3/13	
10:00			81. Decision '92—Democratic Convention 5.1/10	
10:30				
TUESDAY	11.2/20	14.3/26	5.4/9	NO PROGRAMING
8:00	5. Full House 13.0/25	11. All Star Pregame 10.4/21	76. Mann & Machine 5.6/10	
8:30	2. Home Improvmt 14.9/27	3. Major League Baseball All Star Game 14.9/27		
9:00	1. Roseanne 15.3/26		60. Quantum Leap 6.2/10	
9:30	6. Coach 12.6/21			
10:00	70. '92 Vote—Democratic National Covention 5.8/10		84. Decision '92—Democratic Convention 4.4/8	
10:30				
WEDNESDAY	5.7/11	5.0/9	7.7/14	10.8/20
8:00	67. Wonder Years 5.9/11	67. Howie 5.9/11	16. Unsolved Mysteries 10.0/18	14. Beverly Hills 90210 10.1/19
8:30	59. Growing Pains 6.4/12	88. Celebration 3.8/7		
9:00	55. Doogie Howser 6.7/12	81. Campaign '92—Democratic Convention 5.1/9	31. Seinfeld 8.3/14	9. Melrose Place 11.4/20
9:30	71. '92 Vote—Democratic National Covention 5.7/10		31. Dear John 8.3/15	
10:00			79. Decision '92—Democratic Convention 5.3/10	
10:30				
THURSDAY	6.3/11	6.7/12	7.9/14	9.2/17
8:00	66. The Young Riders 6.0/11	31. Top Cops 8.3/16	40. A Diffrnt World 7.6/15	29. Simpsons 8.5/17
8:30			22. Cosby 9.1/17	40. Parker Lewis 7.6/14
9:00	49. '92 Vote—Democratic National Covention 6.9/12	60. Campaign '92—Democratic Convention 6.2/11	8. Cheers 11.6/21	11. Beverly Hills 90210 10.4/18
9:30			55. Decision '92—Democratic Convention 6.7/12	
10:00				
10:30				
FRIDAY	10.2/20	6.4/13	7.6/15	5.0/10
8:00	17. Family Matters 9.8/21	76. Burt Reynolds' Conversations 5.6/12	36. Matlock 8.0/16	71. America's Most Wanted 5.7/12
8:30	19. Step By Step 9.7/20			81. Sightings 5.1/10
9:00	24. Dinosaurs 9.0/18	51. CBS Friday Movie—Blood River 6.8/13		91. Hidden Video 2 3.3/6
9:30	29. Perfect Strangers 8.5/16			
10:00	7. 20/20 12.2/24		49. Law and Order* 6.9/14	
10:30				
SATURDAY	6.6/14	7.3/16	6.6/14	5.8/13
8:00			55. Golden Girls 6.7/16	63. Cops 6.1/14
8:30	63. Miss World America Pageant 6.1/13	47. CBS Saturday Movie—Fourth Story 7.2/16	71. Home Fires 5.7/13	51. Cops 2 6.8/15
9:00			43. Empty Nest 7.4/16	58. Code 3 6.6/14
9:30			43. Nurses 7.4/15	89. Vinnie & Bobby 3.7/8
10:00	39. The Commish 7.7/16	40. Jake and the Fatman 7.6/16	63. Sisters 6.1/13	
10:30				
SUNDAY	7.6/15	11.5/22	6.9/13	6.8/13
7:00	86. Moe's World 4.3/10	4. 60 Minutes 14.7/33	91. Olympic Sendoff 3.3/8	87. Bill & Ted 4.0/9
7:30			90. Against All Odds 3.6/8	84. True Colors 4.4/10
8:00	26. Am Fun Hme Vid 8.9/18	10. Murder, She Wrote 11.1/22	67. In the Heat of the Night 5.9/12	36. In Living Color 8.0/16
8:30	24. Am Fun People 9.0/17			60. Rachel Gunn, R.N. 6.2/12
9:00	28. ABC Sunday Night Movie—Crossing Delancey 8.6/15	14. CBS Sunday Movie—Locked Up: A Mother's Rage 10.1/18	21. NBC Sunday Night Movie—Carolina Skeletons 9.2/16	17. Married w/Childn 9.8/17
9:30				22. Down the Shore 9.1/16
10:00				51. Herman's Head 6.8/12
10:30				71. Stand by Your Man 5.7/10
WEEK'S AVGS	7.7/15	8.5/16	7.0/13	7.3/14
SSN. TO DATE	11.5/19	12.8/22	11.7/20	7.6/13

RANKING/SHOW (PROGRAM RATING/SHARE) *PREMIERE SOURCE: A.C. NIELSEN YELLOW TINT IS WINNER OF TIME SLOT

TRADING PICKS UP AS DUOPOLY NEARS

Station demand increases, but availability of credit may await business improvement

By Peter Viles

As the FCC's new rules expanding the horizons of radio ownership draw near, the marketplace for stations is beginning to show signs of recovery missing elsewhere in the broadcasting industry.

In a trend many industry observers attribute to the prospect of the new rules, station trading is up significantly this year— 48% through mid-July, from $311.9 million in 1991 to $462.9 million now.

"The station trading activity has already picked up as a result of the anticipated rule change, and it will simply continue—if anything at an increased pace," says broker Jim Blackburn of Blackburn & Co.

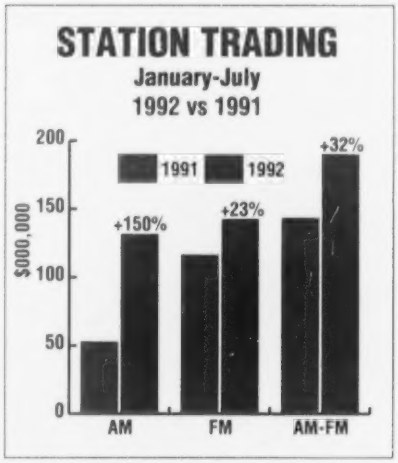
By expanding the number of stations a group can own in a single market from two to four, the rules changes will allow previously topped-out operators to buy more stations, essentially creating a temporary surge in demand, brokers say.

"There's probably as much or more in the way of dollar volume waiting on the duopoly decision as we have seen thus far year-to-date," says William Steding, president of Star Media Group.

Brokers predict a rapidly changing landscape of radio ownership over the next several months. "There can't be anybody in the radio business that isn't thinking buy or sell," says broker Gary Stevens, echoing what seems to be the consensus among brokers.

"You've got to do one or the other," adds Glenn Serafin of Communications Equity Associates. "You can't stand still. You have to protect your turf."

But because there appears to be no quick solution to the lack of credit that has stymied the industry during the recession, some large groups may look for merger opportunities rather than acquisitions, brokers say.



"I don't expect the flow of bank debt to significantly increase until the business has already improved," says Blackburn.

Like most brokers, Randy Jeffrey of Media Venture Partners predicts a flurry of station trading that will ultimately help the industry consolidate. But he says the unfortunate aspect of the new rules is that some proven operators struggling under large debt loads will probably miss out on the opportunities presented by duopoly. "In my thinking it's the most beneficial and far-reaching decision the FCC has made in a very long time," he says. "But it may be for some people that it's too little too late."

Most brokers predict the first flurry of activity will consist of groups snatching up individual stations or combinations to create duopolies. Already, some operators have started to move. In Florida, Lowell "Bud" Paxson has reportedly reached agreements that will give him duopolies in Tampa, Orlando and Jacksonville. And Evergreen Media has announced its plans to purchase a second FM in Jacksonville.

Blackburn said his company is now working on six separate deals in which stations involved in local marketing agreements (LMA's) are exercising buyout options to form duopolies.

William Figenshu, senior vice president, Viacom Broadcasting, says he assumes that most other large station groups are doing what he is—shopping for stations in markets where they already own.

"We're all at the table and we've all got our chips, but nobody's put the first card on the table yet," he says.

Among the groups said to be hunting for stations: Bonneville, Capital Cities/ABC, CBS, Clear Channel, Cox, Gannett, Greater Media, Golden West, Infinity, Jefferson Pilot, Nationwide Communications, Park Communications, Saga Communications, Salem Communications, Sconnix Broadcasting and Shamrock.

Bigger deals, such as the merger of two groups that serve overlapping markets, are widely anticipated, but probably not immediately after the new rules take effect.

"The game of merger and mix and match, if you will, is really not under way in any significant fashion," Steding says. "There are conceptual discussions regarding mega-mergers, but no real deal structuring yet."

What remains to be seen is exactly what benefits broadcasters will get from owning a second FM or second AM station in a market. "Everyone agrees that there will be cost savings," says Blackburn. "Not everyone agrees that there will be aggregate revenue increases." ■

AM LEADERS LOSE GROUND IN CHICAGO, PHILADELPHIA, BOSTON

The market-leading AM stations in Chicago, Philadelphia, San Francisco and Boston all lost ground to FM music stations in the spring Arbitron surveys, and country stations appeared to continue their climb.

In Chicago, the survey showed Tribune Broadcasting's WGN(AM) clinging to a shrinking lead over Gannett's WGCI(FM). WGN, a full-service talk station, dropped from 8.8 to 7.6, while WGCI, an urban contemporary station, rose from 6.8 to 7.3.

In San Francisco, Capital Cities/ABC's KGO(AM), a news/talk station, held the top spot, but dipped slightly. KMEL(FM), the CHR giant recently purchased by Evergreen Media, jumped from 4.6 to 5.6 and into second place. Another big gainer: talk station KNBR(AM), which jumped from seventh to third.

Philadelphia's news leader, Group W Radio's KYW (AM), lost nearly two shares (8.4 to 6.6), and also its hold on first place, to Tak Communications' urban-formatted WUSL(FM).

Detroit's full-service leader, Capcities' WJR(AM), bucked the trend of slipping AM powerhouses. It rose from 8.3 to 8.8 and solidified its grip on the market. Country was hot in Washington, as Viacom's WMZQ-AM-FM gained strongly, from 6.1 to 7.6, and appeared within striking distance of the market leader, CHR-formatted WPGC(FM), down slightly to 8.6.

Country continued to dominate Dallas-Fort Worth, claiming four of the top eight spots. Capcities' KSCS(FM) again led the market, with Infinity's AC combo, KVIL-AM-FM, jumping from fourth to second. Alliance Broadcasting's KYNG(FM), climbing fast with its "Young Country" format, gained a full share, from 3.1 to 4.1, more than double its fall '91 share of 1.6.

In Boston, talk station WRKO(AM) dropped from 7.4 to 5.5 and from first to third overall. The new market leader is Pyramid Broadcasting's WXKS(FM), a CHR station that jumped from 5.8 to 6.9. Group W Radio's WBZ(AM), which dropped its full-service format for a news/talk hybrid, held its second spot, and gained slightly, from 5.9 to 6.3. —PV

Station	Format	Winter	Rank	Spring	Rank
3. Chicago					
WGN(AM)	MOR/Talk	8.8	1	7.6	1
WGCI(FM)	Urban	6.8	2	7.3	2
WBBM(FM)	CHR	5.0	3	5.7	3
WUSN(FM)	Country	4.7	4	5.5	4
WWBZ(FM)	AOR	4.0	5	4.6	5
WVAZ(FM)	Urban	3.9	7	4.4	6
WBBM(AM)	News	4.0	5	3.9	7
WJJD(AM)	Standards	3.4	10	3.7	8
WLIT(FM)	AC	3.7	9	3.4	9
WXRT(FM)	AOR	3.8	8	3.3	10
WJMK(FM)	Oldies	2.9	14	3.3	10
4. San Francisco					
KGO(AM)	News/Talk	8.4	1	7.7	1
KMEL(FM)	CHR	4.6	3	5.6	2
KNBR(AM)	Talk	3.4	7	4.5	3
KCBS(AM)	News	4.9	2	4.4	4
KSAN(FM)	Country	3.7	6	4.0	5
KOIT(AM/FM)	Soft AC	3.9	5	3.8	6
KIOI(FM)	AC	3.3	8	3.5	7
KFRC(AM)	Nostalgia	4.5	4	3.5	8
KITS(FM)	Modern Rock	2.5	12	3.2	9
KBLX(AM/FM)	AC	1.7	20	3.0	10
5. Philadelphia					
WUSL(FM)	Urban	7.1	2	6.9	1
KYW(AM)	News	8.4	1	6.6	2
WYSP(FM)	Classic Rock	5.9	5	6.5	3
WPEN(AM)	Nostalgia	5.5	6	6.4	4
WMMR(FM)	AOR	6.2	3	5.5	5
WEAZ(FM)	AC	6.0	4	5.3	6
WYXR(FM)	AC	4.2	10	5.1	7
WOGL(FM)	Oldies	3.8	11	5.1	7
WXTU(FM)	Country	4.3	9	4.9	9
WEGX(FM)	CHR	4.9	7	4.6	10
6. Detroit					
WJR(AM)	News/Talk/AC	8.3	1	8.8	1
WJLB(FM)	Urban	6.3	2	6.8	2
WWWW(FM)	Country	5.0	4	6.3	3
WHYT(FM)	CHR	4.6	7	5.1	4
WWJ(AM)	News	6.2	3	4.6	5
WJOI(FM)	Easy	4.4	9	4.3	6
WKQI(FM)	CHR	4.4	9	4.3	6
WMXD(FM)	Urban	3.1	15	4.1	8
WLTI(FM)	Soft AC	4.7	6	4.0	10
WXYT(AM)	News/Talk	4.8	5	4.0	10
7. Washington					
WPGC(FM)	CHR	8.8	1	8.6	1
WMZQ(AM/FM)	Country	6.1	2	7.6	2
WKYS(FM)	Urban	4.3	5	5.7	3
WGAY(FM)	Light AC	5.0	3	5.4	4
WRQX(FM)	Hot Mix	3.9	8	4.4	5
WMAL(AM)	News/Talk	4.9	4	4.3	6
WASH(FM)	AC	3.2	11	4.1	7
WHUR(FM)	Urban	2.9	16	3.8	8
WWDC(FM)	AOR	4.0	6	3.6	9
WTOP(AM)	News	3.7	9	3.6	9
8. Dallas-Fort Worth					
KSCS(FM)	Country	9.9	1	9.5	1
KVIL-AM-FM	AC	5.6	4	6.4	2
KPLX(FM)	Country	6.5	2	5.8	3
KJMZ(FM)	Urban	5.7	3	5.6	4
WBAP(AM)	Country	4.3	7	5.3	5
KKDA(FM)	Urban	4.7	6	4.5	6
KTXQ(FM)	AOR	4.7	5	4.3	7
KYNG(FM)	Young Country	3.1	11	4.1	8
KLRX(FM)	Urban	3.9	8	3.8	9
KDMX(FM)	Mix AC	2.4	17	3.4	10
KRLD(AM)	News/Sports	3.8	9	3.4	10
9. Boston					
WXKS(FM)	CHR	5.8	4	6.9	1
WBZ(AM)	News/Talk	5.9	2	6.3	2
WRKO(AM)	Talk	7.4	1	5.5	3
WMJX(FM)-WMEX(AM)	AC	5.2	6	5.4	4
WBCN(FM)	AOR	5.4	5	5.3	5
WODS(FM)	Oldies	4.6	8	5.1	6
WSSH(FM)	Easy	4.3	10	5.0	7
WZOU(FM)	CHR	5.9	3	4.8	8
WZLX(FM)	Classic Rock	3.6	12	4.6	9
WHDH(AM)	Talk	4.9	7	4.4	10

All ratings are total week, 12-plus, AQH share. New York and Los Angeles ratings were reported last week.

NIELSEN GAINS GROUND IN RATING WAR

Push to sign up group owners appears to have paid dividends; Arbitron client list has decreased despite effort to stem tide

By Sharon D. Moshavi

One year ago Arbitron Communications set out to try to turn back the tide of defecting stations. Despite that effort, it continues to lose market share to rival local ratings service A.C. Nielsen.

Nielsen has bolstered its share by attracting entire station groups through negotiated lower rates. Meanwhile, Arbitron is focusing on proving the benefits of ScanAmerica, its metering service designed to measure viewing as well as product purchases tied to commercials. So far, ScanAmerica is getting mixed reviews.

"Arbitron is more concerned about ScanAmerica than in trying to do a group owner push. They have to be. Their success relies on this system of measurement," says Debra Zeyen, vice president, Group W Television Stations.

Nielsen appears to be taking advantage of Arbitron's diverted attentions, and continues to eat away at Arbitron's clients. Nielsen has gone from 286 exclusive clients in May 1991 to 323 in May 1992, an increase of 13%. Arbitron has fallen 8%, from 199 exclusive station clients in May 1991 to 184 a year later. The total commercial station count is 641 for Nielsen and 502 for Arbitron as of May, compared with 626 and 539, respectively, a year ago.

Yellow number is exclusive commercial station clients; white is total clients

Last year, Arbitron appeared to be taking steps to redesign its overall service, including lowering prices. An internal memo from last summer stated that Arbitron's "high rates have lost many more negotiations than we have won, primarily to our competitor's posture of lower rates to increase its share of stations." The memo continued, if this trend goes on "Arbitron will lose" (BROADCASTING, July 22, 1991).

Arbitron never had a "formal action plan" to alter its service, according to Tom Mocarsky, vice president, communications. Rather, he says, the company's direction has been to enhance its ratings service with extras like Scarborough, a local market qualitative measurement system, and MediaWatch, which provides local commercial monitoring. Mocarsky would not discuss rates.

If prices have come down, they have not dropped low enough to stop stations from leaving. Nielsen is pushing to sign up station groups, clients say, by offering lower rates for getting the entire group. "We did not have any overwhelming motive other than economics," says Robert Dix, chairman of Dix Broadcasting's TV division, which two weeks ago signed a group deal with Nielsen and is dropping Arbitron. Ralph Oakley, vice president, Quincy Newspapers, a Nielsen group client, agrees. "It's attractive from a financial point of view to have all stations under one service."

Unless the pricing differential changes, Arbitron may be in for more trouble, since many perceive that the trend to just one ratings service will continue. "In the new economics of broadcasting, you just simply can't afford to have both entities," says August Meyer, Jr., president of Midwest Television, which signed a group deal

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with Nielsen and is dropping Arbitron.

Nielsen additionally seems to be deriving some gains through station dissatisfaction with ScanAmerica, which so far is in the Denver, Phoenix, St. Louis and Pittsburgh markets. "We don't believe in the ScanAmerica technology," says Jack Shenkan, director of sales and marketing for Hearst Broadcasting, which turns its business entirely over to Nielsen come January.

Shenkan says the system is too user-intensive, so only "technocrats" are able to operate it, giving a skewed reading. Hearst's station in Pittsburgh saw its ratings drop appreciably under ScanAmerica's measuring system, and subsequently dropped the service. Group W, a group client of Nielsen's that still has some Arbitron contracts, has similar concerns about ScanAmerica. Group W also dropped ScanAmerica from its Pittsburgh affiliate. "We have questions about ScanAmerica. We just don't know how valid the data is," says Group W's Zeyen.

Arbitron's Mocarsky acknowledges that the company "needs to do a better job showing the value of the service. We haven't been talking about that value as much as we should have." ■

Changing Hands

This week's tabulation of station and system sales ($250,000 and above)

KARD(TV) West Monroe, La. □ Sold by Woods Communications Group Inc. to Lipps Communications Inc. for $3.13 million. **Seller** is headed by Charles Woods and is also licensee of WTVY-FM-TV Dothan and WACV(AM) Montgomery, both Alabama; WTVW (TV) Evansville, Ind.; KDEB-TV Springfield, Mo., and KATP(FM) Amarillo, Tex. Woods also owns KLBK-TV Lubbock, Tex. **Buyer** is headed by Rick Lipps, who is vice president of assignor. KARD is ABC affiliate on ch. 14 with 5,000 kw visual and 500 kw aural and antenna 2,049 feet.

KRTY(FM) Los Gatos (San Jose), Calif. □ Sold by Randolph E. George, receiver, to newly formed South Bay Broadcasters of California Ltd. for $2.9 million. Station has approval to double its power to 6 kw. **Seller** is media broker and has no other broadcast interests. **Buyer** is headed by station's general manager and general sales manager Gregory G. Herpin and Joel Schwartz, respectively, William L. Yde III, who owns stations in Tucson, Ariz., and other limited partners. KRTY has country format on 95.3 mhz with 370 w and antenna 806 feet above average terrain. *Broker: Media Venture Partners.*

KCHX(FM) Midland, Tex. □ Sold by Kellsey Broadcasting Corp. to Sonance Midland L.C. for $700,000. **Seller** is headed by Jon C. Peterson, who has interests in WWGS(AM)-WCUP(FM) Tifton, Ga. **Buyer** is headed by brothers William R., Thomas O. and R. Steven Hicks. Thomas and William Hicks have interests in WTAW (AM)-KTSR(FM) College Station and KLVI(AM)-KYKR-FM Beaumont-Port Arthur, both Texas. William Hicks also has interests in KULF(FM) Brenham, Tex. Steven Hicks owns Capstar Inc., which owns WJDS(AM)-WMSI(FM) Jackson, Miss.; WSSL-AM-FM Greenville-Spartanburg, S.C., and WSIX-FM Nashville; Capstar was recently merged into CF Media (see BROADCASTING, March 23). KCHX has CHR format on 106.7 mhz with 100 kw and antenna 613 feet above average ter-

PROPOSED STATION TRADES

By volume and number of sales

This Week:

AM's □ $1,165,148 □ 6
FM's □ $4,772,057 □ 7
AM-FM's □ $421,673 □ 2
TV's □ $3,130,000 □ 1
Total □ $9,488,878 □ 16

1992 to Date:

AM's □ $132,295,663 □ 125
FM's □ $147,049,349 □ 135
AM-FM's □ $189,961,478 □ 91
TV's □ $1,184,301,620 □ 39
Total □ $1,653,608,110 □ 390

For 1991 total see Jan. 27, 1992 BROADCASTING.

CLOSED!

WZCR-FM, Ft. Myers Beach, Florida from Gerard A. McHale, Jr., Receiver to John R. Linn for $1,550,000.

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rain. *Broker: Barger Broadcast Transactions.*

WNBE(FM) Alamo, Tenn. □ CP sold by Charles C. Allen to Good News Network Inc. for $471,057. **Seller** has no other broadcast interests. **Buyer** is headed by John Latham and has interests in WFWL(AM)-WRJB(FM) Camden, WGNN(FM) Dresden and WIST(FM) Lobelville, all Tennessee. WNBE has soft AC format on 93.1 mhz with 25 kw and antenna 328 feet above average terrain.

KLXX(AM)-KBYZ(FM) Bismarck-Mandan, N.D. □ Sold by Capital City Communications Inc. to Missouri River Broadcasting Inc. for $395,000. **Seller** is headed by James Lakoduk and has no other broadcast interests. **Buyer** is headed by James D. Ingstad and has interests in six AM's and seven FM's. KLXX has oldies format on 1270 khz with 1 kw day and 250 w night. KBYZ has AC format on 96.5 mhz with 100 kw and antenna 1,000 feet above average terrain.

For other proposed and approved sales see "For the Record," page 66.

TV AD BUYS STILL ON SHORT LEASH

Study by Petry shows lead time has declined; almost half of orders confirmed with less than one week to go

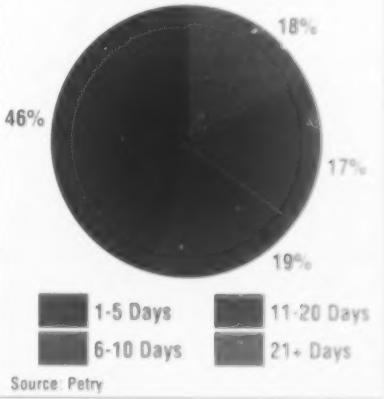
By Geoffrey Foisie

Broadcasters have long said lead times for ad buys have shrunk. Now a recent study by Petry, the television rep firm, documents short lead times and says that compared with two years ago, the lead times are still shrinking. The slight strengthening in the advertising marketplace, however, may reverse that trend, some broadcasters said.

The Petry study, compiled by Petry's vice president of research, Teddy Reynolds, shows that almost half of orders for national spot station advertising placed through reps are confirmed fewer than five business days to go before the ad is to air (see chart). The 46% placed with five days or fewer is up 5% from two years ago. The 18% placed with 21 or more days left is down 1%, and the 17% placed with between 11 and 20 days left is down 4%.

LEAD TIME OF SPOT TV BUYS

# of business days between confirmation of order and start of schedule



Source: Petry

Reynolds noted that a multipart ad buy may have been largely completed weeks before, but if some of the buy is left uncertain until the last minute, then, according to the study, the whole order shows up as having a short lead time.

Many advertisers are faced with paying a premium for last-minute ad buys. Peter Staasi, director of local broadcast for BBDO, also noted that an advertiser who requires "heavy weight" at the last minute may find it impossible to satisfy those requirements: "Stations don't give away their news and *L.A. Law* at the last minute. There may be available *Hogan's Heroes*, but you don't want that to be a majority of your buy."

Some of the current short lead time may be buying habits left over from last year's recession, said Lou Supowitz, general sales manager of WFTV(TV) Orlando, Fla. With inventory in that market getting tighter, buying habits will change, he said. "We are starting to get more lead time in planning, but the year didn't start out that way." Some buys will almost always come in with little lead time, said Cliff Fisher, general sales manager of WKBW-TV Buffalo, N.Y.: "Things like movies or the New York state lottery." ■

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SATELLITES: THE NEXT GENERATION

In the next 10 months, ABC, CBS, PBS, HBO, TBS and dozens of other cable programs will see a collective $1 billion investment head into orbit

By Peter Lambert

Hold on to your seats. It's launch time. And uninterrupted satellite distribution of more than half the cable networks and two of three broadcast networks will be at stake as Hughes Communications, GE American Communications and AT&T launch seven next-generation TV birds over the next eight months.

The new generation began in a small way in 1990, with the launch of GE Americom's Satcom C-1, a bird that has quietly developed into the number-five cable bird, carrying all the Prime Network regional cable sports services, SportsChannel Los Angeles and a handful of superstations sold to home dish subscribers.

Last March, Hughes Communications launched the first of four primary cable satellites, Galaxy V. Two years ago, Turner Broadcasting System and Home Box Office formed a co-venture to buy a large chunk of two Hughes birds designed to replace Galaxy I and Westar V before they run out of gas.

The first of those replacements, Galaxy V, became operational May 8, carrying A&E, CNN, Disney, ESPN, HBO, TNT, USA Network, WGN-TV Chicago, WTBS(TV) Atlanta and a dozen other top basic channels.

One down, three to go, for cable. In August, McDonnell Douglas is scheduled to launch Galaxy IR, and Arianespace is to launch GE Americom's Satcom C-4. Two months later, Satcom C-3 is set to launch. The Satcom birds are "practically sold out" now, says W. Neil Bauer, senior vice president and general manager of commercial operations for GE Americom, thanks mainly to a 1989 purchase by a consortium that includes Viacom Networks (including Showtime and MTV), C-SPAN, Lifetime and The Weather Channel. Given a few more deals, Bauer says, C-3 and C-4 could be entirely sold out by the time they become operational late this year or early next year.

Although the launch business has proved as risky as ever—the image of space shuttle astronauts rescuing an Intelsat bird by hand earlier this summer may be permanently branded on the American psyche—the satellite operators have built ground spares. Better yet for cable networks, both Hughes and GE have put new fleet spares in orbit first, each carrying emergency capacity for their all-important cable and broadcast clients.

This fall will also bring a new anxiety factor into the launch experience—

Proposed domestic satellites

Carrier Satellite	C-band	Ku-band	Orbital slot	Launch date
AT&T				
Telstar 401	24	24	97	May 1993
Telstar 402	24	24	89	March 1994
GE Americom				
Satcom C-4	24	--	135	Aug. 1992
Satcom C-3	24	--	131	Sept. 1992
Satcom H-I	24	16	85	1994
Hughes Communications				
Galaxy IV	24	24	99	Aug. 1992
Galaxy VII	24	24	91	Oct. 1992
Galaxy IR	24	--	133	Dec. 1992
Galaxy IIIR	24	--	95	1994

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a new class of the largest satellites ever built, in this case for CBS and ABC.

Hughes will loft two of four of these new generation spacecraft with hybrid C/Ku-band payloads. Hughes's Galaxy VII will go first in October, Galaxy IV in December. (The world is scheduled to see the Chinese launch the first such HS-601 satellite for Australian broadcasters Aug. 20.)

Leaving longtime partner AT&T behind, CBS has purchased 10 C-band and two Ku-band transponders across Galaxys IV and VII, each of which carries 24 transponders in each band. According to Hughes Senior Vice President Jerry Farrell, new traffic combined with newsgathering, business and educational traffic that is to migrate from all-Ku-band SBS 4 adds up to about 50% occupancy for Galaxy VII. With traffic from C-band Westar IV migrating to Galaxy IV, Farrell says half that bird's Ku-band and three-quarters of its C-band capacity is filled.

AT&T will launch a similar pair of C/Ku hybrid satellites for ABC and PBS. Telstar 401 is scheduled to launch in May 1993. Telstar 402 will fly about 10 months later. In addition to 24 C-band channels, Telstar will offer a combination of 27 mhz Ku (16 of them) and 54 mhz Ku (eight of them) transponders. ABC will be free to deliver multiple newsgathering signals over the broader Ku transponders. And ABC and PBS will even have the option to combine 60-watt Ku's to deliver 120-watt power to small dishes for a direct broadcasting application.

The new AT&T hybrids will also allow broadcasters to uplink in one band and downlink in another, eliminating second hops or conversions on the ground.

Critically, the major cable and broadcast networks have obtained enough capacity on all the birds to add new digitally compressed services.

Only one major network, NBC, remains unsigned. Their capacity aboard co-owned GE Americom's Satcom K-2 will remain operational into early 1997, and NBC is expected to make a replacement decision late this year. ■

COUNTDOWN TO RENEWABLE SECURITY

Before the end of 1992, cable programers, beginning with pay services such as HBO and Showtime, will begin to shut off satellite transmissions encrypted by the VideoCipher II, a system that had spawned a huge black market in illegally altered consumer descramblers.

The prospective end of home satellite signal piracy began earlier this year when cable programers agreed to adopt VideoCipher-RS, General Instrument Corp.'s "renewable security" version of the de facto industry standard decoder (BROADCASTING, Feb. 17).

GI put up $50 million to supply about 270,000 legal VC-II owners with VC-RS, complete with a slot for insertion of a TvPass security card. The card, bearing security information, would be disseminated, given a break in VideoCipher.

"The VC-RS upgrade is on schedule, and we expect a VC-II shut-down by some programers by early this fall," says Esther Rodriguez, head of domestic products marketing for General Instrument's VideoCipher Division.

Last month, a group including some of the original VideoCipher patent holders formed a joint venture to market a VC-RS-compatible descrambler. Negotiating now to gain cable programer support, Titan Satellite Systems Corp. says it will demonstrate a "functioning" receiver-decoder at next week's Satellite Broadcasting and Communications Association trade show in Baltimore. —PBL

Satellite guide to the sky

Carrier Satellite	[1]C-band	Ku-band	Approximate end-of-life	Orbital slot
AT&T				
Telstar 301	24	--	Dec. 1993	96
Telstar 302	24	--	Sept. 1994	85
Telstar 303	24	--	Apr. 1995	123
GE Americom				
Satcom C-1	24	--	Nov. 2000	139
Satcom II-R	24	--	Jan. 1995	72
Satcom I-R	24	--	April 1993	131
Satcom IVR	24	--	Feb 1993	82
Satcom C-5	24	--	Jan. 2001	143
Satcom K-1	--	16	Dec. 1996	85
Satcom K-2	--	16	April1997	81
GTE Spacenet/Contel ASC [2]				
Spacenet I	18	6	May 1994	120
Spacenet II	18	6	Nov. 1994	69
Spacenet III	18	6	March 1998	87
Spacenet IV	18	6	April 2001	101
GStar I	--	16	May 1995	103
GStar II	--	16	March 1996	105
GStar III	--	16	Sept. 1994	125
GStar IV	--	24	Nov. 2002	64
ASC I	18	6	Aug. 1995	128
Hughes Communications				
Galaxy I	24	--	June 1993	133
Galaxy II	24	--	Sept. 1993	74
Galaxy III	24	--	Sept. 1994	93.5
Galaxy V	24	--	March 2002	125
Galaxy VI	24	--	Nov. 2000	99
SBS 4	--	10	Aug. 1994	91
SBS 5	--	14	Sept. 1998	123
SBS 6	--	19	Nov. 2000	99

[1] C-band and Ku-band columns indicate numbers of transponders on each satellite. End-of-life estimates are based on launch date plus average 10 or 12 years.
[2] GTE and Contel merged in March 1991. Contel ASC's second satellite, ASC II, was renamed Spacenet IV.

proval of sale of station to Dixie Communications (see "For the Record," July 20). **Seller** is headed by James Corbin, and owns CP for new station WYBJ(FM) Greenville, MS. **Buyer** is headed by Duane E. Hill, and has no other broadcast interests. Action June 19.

■ **WBBX(AM) Kingston, TN** (BAL920520EB; 1410 khz; 500 w-D)—Granted assignment of license from Hometown Broadcasting Corp. to Pilgrim Pathway Inc. for $35,000. **Seller** is headed by William R. Tullock Jr., and has no other broadcast interests. **Buyer** is headed by Grant Carter, and has no other broadcast interests. Action June 30.

■ **WBFL(FM) Bellows Falls, VT** (BALH920527GX; 107.1 mhz; 1 kw; ant. 530 ft.)—Granted assignment of license from Bradley Broadcasting Inc. to WBFL Inc. for $240,000, assumption of debt. **Seller** is headed by Bradley Weeks, and has no other broadcast interests. **Buyer** is headed by Edward H. Herlihy, and has no other broadcast interests. Action July 9.

NEW STATIONS

Applications

■ **Lake George, NY** (BPH920707MD)—William H. Walker III seeks 98.5 mhz; 6 kw; ant. -118 m. Address: 8280 Greensboro Drive, 7th Floor, McLean, VA 22102. Applicant has no other broadcast interests. Filed July 7.

Actions

■ **Philadelphia** (BPH910701MF)—Dismissed app. of Pennsylvania Broadcasters for 102.1 mhz; 40 kw; ant. 150 m. Address: 6255 Sunset Blvd. #1901, Los Angeles, CA 90028. Applicant is headed by general partners A. Thomas Quinn, Richard Nagler, Amy L. Quinn and Judy Nagler. Thomas Quinn has interests in one AM and two FM's. Action July 10.

■ **Pittsburgh** (BPH910701ME)—Dismissed app. of Pennsylvania Broadcasters for 93.7 mhz; 23.1 kw; ant. 220 m. (see above). Action July 10.

FACILITIES CHANGES

Applications

■ **Bay Minette, AL** WFMI(FM) 106.5 mhz—June 29 application of Baldwin Broadcasting Co. for CP to make changes; change ERP: 9.41 kw (H&V); ant.: 162 m.; TL: Baldwin County, AL, approximately 6 km southwest of Stapleton; former antenna tower of WKRG-TV; change class to C3 (per MM docket #91-246).

■ **Clovis, CA** KSDI(TV) ch. 43—July 6 application of San Joaquin TV Improvement Corp. for MP (BPCT-820510KI) to change TL: Bear Mountain, approx. 2 km northwest of Squaw Valley (Fresno), CA (36-44-45 119-16-57).

■ **Shreveport, LA** KWLB(TV) ch. 45—June 23 application of Word of Life Ministries Inc. for MP (BPCT-861029KY) to change ERP (vis): 1670 kw; ant.: 159 m.; TL: Rt. 173, 1.6 km NE from intersection of routes 1 and 173, Blanchard, La Caddo Parish (32-38-17 - 93-52-45); antenna: Andrew ALP24L3-HSM-45M (DA)(BT).

■ **Lebanon, MO** KTTK(FM) 89.9 mhz—July 6 application of Lebanon Educational B/C Foundation for mod. of CP (BPED-831128AE) to make changes; change TL: southwest part of Lebanon (twn. 34-N, range 16 west, Laclede County).

■ **Potosi, MO** KHCR(FM) 97.7 mhz—June 23 application of Prime Time Radio for mod. of CP (BPH-891222MF) to make changes, ERP: 8.531 kw H&V, ant.: 168 m., TL: 2 mi., bearing 45 degrees from Potosi on Highway 21, Washington County, from class A to C3.

■ **Las Vegas** KENO(AM) 1460 khz—June 18 application of Lotus Broadcasting Corp. for CP to increase daytime power to 30 kw; change TL to west of Highland Drive and .6 km south of Cheyene near center of section 16, township 20 south of range 61 east, North Las Vegas, and make changes in antenna system: 36 12 44 - 115 09 43.

■ **Santa Fe, NM** KSWV(AM) 810 khz—June 19 application of La Voz Broadcasting Co. Inc. for CP to change TL within triangle formed by Arroyo de las Trampas, Buckman Rd and existing rd. NW within city limits, Santa Fe, and make changes in antenna system 35 42 05 - 105 57 58.

■ **Concord, NC** WUNG-TV ch. 58—June 17 application of University of North Carolina for MP (BPET-890317KG) to change ant.: 422 m.; antenna: Andrew AGW28HS5-ET01-5B (ST).

■ **North Bend, OR** 94.9 mhz—June 15 application of Koos Bay Broadcasting Corp. for CP to make changes; change ERP: 37 kw (V); ant.: 209.7 m.

■ **San Juan, PR** WSJU(TV) ch. 18—July 2 application of International BCasting Corporation for MP (BPCT-910920KQ) to change ERP (vis): 450 kw ant.: 38 m.; TL: Darlington Building, Rio Piedras, PR (18-24-10 66-03-21); antenna: SWR SBC-14/7 (DA)(BT).

■ **Greenwood, SC** WMTY-FM 103.5 mhz—June 18 application of United Community Enterprises Inc. for CP to make changes; ERP: 25 kw H&V and to change class: C3 (per docket #89-404).

■ **Madisonville, TN** WYGO(FM) 99.5 mhz—July 2 application of Major Broadcasting Corporation for mod. of CP (BPH-900518MT) to make changes, ERP: 2 kw H&V, ant.: 148.8 m. and TL: approx. 1.1 km WSW of Roy Knob.

■ **Atlanta, TX** KPYN(FM) 99.3 mhz—June 1 application of Ark-La-Tex Broadcasting Company for CP to make changes, ERP: 50 kw H&V, ant.: 144 m., TL: 8 km northwest of Bloomburg, Cass County, TX, county road 3780; freq.: from 99.3 mhz to 100.1 mhz, and change class: C2 (per docket #84-231).

■ **Denton, TX** KNTU(FM) 88.1 mhz—Jan. 7 application of University of North Texas for mod. of license (BLED-880222KD) to change main facility.

■ **Port Isabel, TX** KVPA(FM) 101.1 mhz—July 7 application of Matthew C. Trub for mod. of CP (BPH-851216NE) to make changes; change ERP: 1.95 kw (H&V); ant.: 111 m.; TL: 1.4 km west of Loma de Los Ebanitos, Cameron County, TX.

■ **Seattle** KING-FM 98.1 mhz—July 7 application of Classic Radio Inc. for mod. of CP (BPH-861104IE) to make changes; change ERP: 56.9 kw (H&V); ant.: 714 m.; TL: West Tiger Mountain, 3.3 km south of High Point, Washington.

■ **Yakima, WA** KRSE(FM) 105.7 mhz—May 14 application of Yakima Broadcasting Co. for CP to make changes: ant.: 178 m.

■ **Romney, WV** WJGF(FM) 89.7 mhz—June 9 application of West Va. Schs. for Deaf and Blind for CP to make change: frequency changed from 89.7 mhz to 88.1 mhz.

■ **Algoma, WI** WBDK(FM) 96.5 mhz—June 24 application of Nicolet Broadcasting Inc. for CP to make changes, ant.: 86.3 m., ERP: 25 kw H&V, frequency from 96.5 mhz to 96.7 mhz; change class: from class A to class C3, and to correct coordinates to 44 38 52 - 87 33 54 (per docket #89-282).

Actions

■ **Fort Rucker, AL** WXUS(FM) 100.5 mhz—Granted app. of Skyway Broadcasting Ltd. (BPH-

SUMMARY OF BROADCASTING & CABLE

BROADCASTING

Service	ON AIR	CP's'	TOTAL*
Commercial AM	4,971	183	5,154
Commercial FM	4,683	950	5,633
Educational FM	1,548	296	1,844
Total Radio	**11,212**	**1,429**	**12,641**
Commercial VHF TV	557	13	570
Commercial UHF TV	581	165	746
Educational VHF TV	123	5	128
Educational UHF TV	236	10	246
Total TV	**1,497**	**193**	**1,690**
VHF LPTV	463	138	601
UHF LPTV	804	829	1,633
Total LPTV	**1,277**	**967**	**2,244**
FM translators	1,901	383	2,284
VHF translators	2,509	72	2,581
UHF translators	2,394	373	2,767

CABLE

Total subscribers	55,786,390
Homes passed	92,040,450
Total systems	11,254
Household penetration†	60.6%
Pay cable penetration/basic	79%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 92.1 million.
' Construction permit. "Instructional TV fixed service. 'Studio-transmitter link.
Source: Nielsen, NCTA and Broadcasting's own research.

In Brief

Most MSO stocks closed Friday down from a week ago following the cable reregulation bill passed by theHouse of Representatives Thursday night. Particularly hard hit were Tele-Communications Inc., which was off 11% for the week, to 18¼, and TCA Cable TV, off 13% to $20. Many MSO stocks were still trading higher than several months ago, and securities analysts were skeptical that cable growth prospects would be severely impaired, even assuming the bill survives House-Senate conference and an expected presidential veto.

Fox enjoyed its first week out of fourth place in its six-year history the week of July 13-19, paced in large part by *Melrose Place*, its *Beverly Hills, 90210* spinoff. For the week, CBS came in first with an 8.5 rating/16 share (NTI), followed by ABC with a 7.7/15, Fox's 7.3/14 and NBC's 7.0/13. Perhaps most important, however, if ABC, Fox and NBC are to be believed, Fox beat all four networks in viewership among adults 18-49, the most sought-after demographic, according to advertisers. *Melrose Place* has not fallen off in its three airings, pulling a 10.3/19 in its premiere on July 8 and followed by an 11.4/20 on July 15 and a 10.1/17 on July 22. Through last Thursday night, Fox was tied with ABC for second place in the week, with CBS leading all networks with a 9.7/18 and NBC behind Fox and ABC by one-tenth of a rating point with a 9.0/16.

NSS POCKETPIECE

(Nielsen's top ranked syndicated shows for the week ending July 12. Numbers represent aggregate rating average/stations/% coverage)

1. Wheel Of Fortune	11.8/226/98
2. Jeopardy!	10.5/218/98
3. Oprah Winfrey Show	10.2/231/99
4. Star Trek	9.1/244/98
5. Married...With Children	7.4/176/96
6. Entertainment Tonight	7.2/191/96
7. Current Affair	6.8/180/98
7. Wheel Of Fortune-wknd	6.8/193/92
9. Donahue	6.3/228/99
10. Cosby Show	6.1/201/97
11. Inside Edition	5.9/142/90
12. Hard Copy	5.1/179/94
13. Love Connection	5.0/196/94
13. Sally Jessy Raphael	5.0/215/98
15. Geraldo	4.8/170/97

News and talk radio veteran **Dan Griffin was named VP/GM of WCBS(AM) New York** last week, replacing Chris Witting, who resigned. A 30-year broadcasting veteran, Griffin joins CBS from WHDH(AM) Boston, where he was president/GM. A CBS spokeswoman said the station plans no changes in its all-news format. Witting resigned last week after a disappointing ratings period during which WCBS lost ground to its main rival, Group W Radio's WINS-(AM), despite a costly television ad campaign attacking WINS.

Century Broadcasting-owned **KREM(FM) San Francisco has been hit with a $25,000 FCC fine for broadcasting "indecent material"** during daytime hours. Executives at Century Broadcasting were unavailable for comment, and counsel for the station had not seen the notice last Friday.

NBC has tapped Hill staffer James Rowe III to succeed the outgoing Bob Hynes as its Washington lobbyist. Rowe, currently counsel to the House Judiciary Subcommittee on Crime, plans to take over the network's Washington office in early September. A graduate of Harvard and Georgetown law (1979), Rowe was in private practice from 1980 to 1987 and worked at the Investigative Group Inc. prior to joining the subcommittee. NBC also named **Warren Jenson** senior VP of finance, **replacing Don Carswell,** who is retiring as CFO after 37 years with the network. Jenson, who will report to NBC President Robert Wright, was

DOWN IN UPFRONT

It looks like this year's upfront won't quite make it to last year's level. The big three are projected to pull in an estimated $3.2 billion, down from last year's $3.4 billion (which excludes Olympics spending). CBS is the big winner, projected to bring in $1.4 billion, with ABC at $1 billion and NBC at $800 million. The slow upfront is still moving, with the three networks still left with another $100 million each to write. Fox is expected to bring in about $500 million, above last year's estimated $350 million-$400 million.

Although CBS has been seeing heavy increases in unit rates—about 12% to 13%—its hefty revenues are also said to come from a willingness to sell more inventory upfront than either NBC or ABC. ABC, as it did last year, has said it wants to hold back inventory for scatter.

NBC is holding on to a larger supply of inventory than usual, largely because it had difficulty getting unit prices above last year's. "I don't know how bad the damage is going to be for them in fourth quarter [scatter]. NBC had more of an urgency to sell out in upfront, since they have the largest schedule of unproven programs," says analyst Alan Gottesman of Paine Webber. NBC's revenue estimates, like those of the other networks, do not include dollars it has coming in from long-term contracts, such as General Motors. -SR